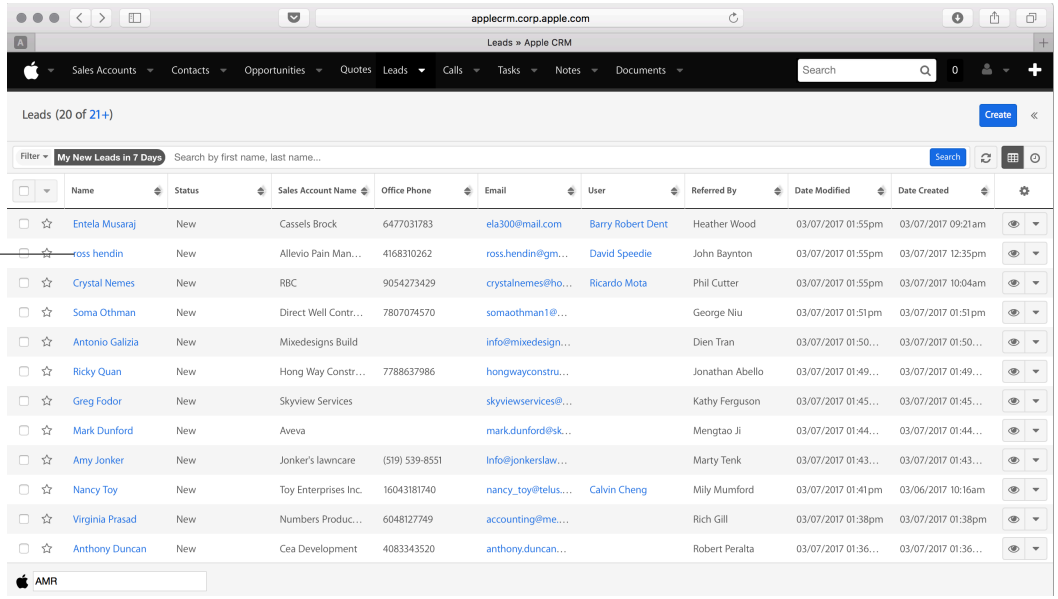
Creating Sales Accounts

Sales Accounts capture the details of the businesses and organizations Apple works with and are the key record of customer information. Most Sales Accounts will be created from an Introduction, which is known as a Lead in Apple CRM. Below is an overview of how to convert a Lead into a Sales Account.

Converting (Qualifying) Leads

1. Start by selecting a Lead from the Lead List view.


applecrm.corp.apple.com
Leads » Apple CRM
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
Leads (20 of 21+)
Create
Filter
My New Leads in 7 Days
Search by first name, last name...
Search
Name
Status
Sales Account Name
Office Phone
Email
User
Referred By
Date Modified
Date Created
Entela Musaraj New Cassels Brock 6477031783 ela300@mail.com Barry Robert Dent Heather Wood 03/07/2017 01:55pm 03/07/2017 09:21am
ross hendin New Allevio Pain Man… 4168310262 ross.hendin@gm… David Speedie John Baynton 03/07/2017 01:55pm 03/07/2017 12:35pm
Crystal Nemes New RBC 9054273429 crystalnemes@ho… Ricardo Mota Phil Cutter 03/07/2017 01:55pm 03/07/2017 10:04am
Soma Othman New Direct Well Contr… 7807074570 somaothman1@… George Niu 03/07/2017 01:51pm 03/07/2017 01:51pm
Antonio Galizia New Mixedesigns Build info@mixedesign… Dien Tran 03/07/2017 01:50… 03/07/2017 01:50…
Ricky Quan New Hong Way Constr… 7788637986 hongwayconstru… Jonathan Abello 03/07/2017 01:49… 03/07/2017 01:49…
Greg Fodor New Skyview Services skyviewservices@… Kathy Ferguson 03/07/2017 01:45… 03/07/2017 01:45…
Mark Dunford New Aveva mark.dunford@sk… Mengtao Ji 03/07/2017 01:44… 03/07/2017 01:44…
Amy Jonker New Jonker's lawncare (519) 539-8551 Info@jonkerslaw… Marty Tenk 03/07/2017 01:43… 03/07/2017 01:43…
Nancy Toy New Toy Enterprises Inc. 16043181740 nancy_toy@telus… Calvin Cheng Mily Mumford 03/07/2017 01:41pm 03/06/2017 10:16am
Virginia Prasad New Numbers Produc… 6048127749 accounting@me… Rich Gill 03/07/2017 01:38pm 03/07/2017 01:38pm
Anthony Duncan New Cea Development 4083343520 anthony.duncan… Robert Peralta 03/07/2017 01:36… 03/07/2017 01:36…
AMR

Select a Lead from the Lead List View to see the Lead Detail View

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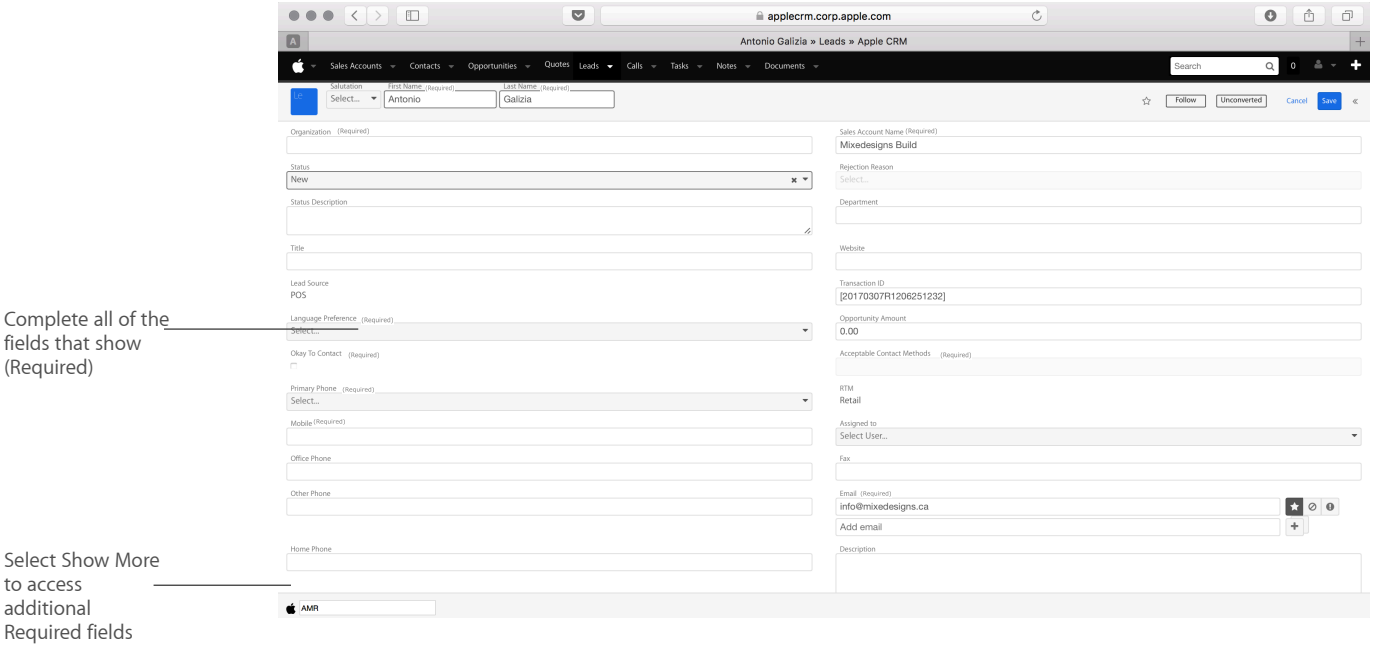
Complete the Required Fields in the Lead Detail View

2. From the Lead Detail View, select the blue Edit button in the upper right hand corner.

3. Complete all of the Required fields. Fields that are Required will show (Required) next to the Field name.



The following fields are required:

- First Name
- Last Name
- Sales Account Name
- Organization Name
- Language Preference
- Email
- Primary Phone Number
- Acceptable Contact Methods
- Okay to Contact Checkbox
- Primary Account Owner
- Account Team
- Primary Address

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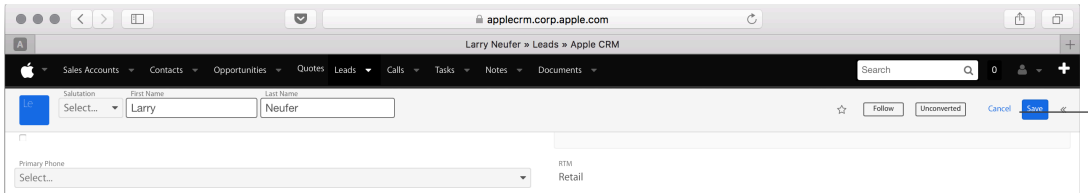
Completing Lead Conversion

4. When all of the Required fields are completed, select Save.



5. Select the blue drop down arrow next to Edit. Select Convert. If all of the Required fields have been completed, all four sections of the Convert Lead view will have a green tick on the left hand side as shown below.

6. Click Save and Convert to convert the Lead into a new or existing Sales Account.

7. You will then be taken back to the Lead page once converted.

For detail on how to create a sales account without a lead reference the *Apple CRM Pilot User Guide*.

See the Apple CRM User Guide for details.

For further details on Lead conversion and creating Sales Accounts, see the Sales Accounts and Introductions and Lead Management sections of the Apple CRM User Guide.

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